



**Global and China Viscose Fiber Industry
Report, 2013-2016**

May 2014

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

In recent years, the United States, Europe and Japan have successively withdrawn from the viscose fiber industry due to labor costs, environmental protection and other factors, while the Asia-Pacific Development Zone, including China, has entered a period of accelerated development of viscose fiber, with capacity and production increasing considerably. In 2013, the global viscose fiber output exceeded 4.9 million tons, up more than 13 % year on year, wherein, China contributed over 65%.

The Austria-based Lenzing Group and the India-based Aditya Birla Group as two viscose fiber giants worldwide gained capacity of above 800,000 tons/a each in 2013. But beyond that, Chinese counterparts also obtained greater capacity.

Viscose fiber includes viscose filament yarn (VFY) and viscose staple fiber (VSF), especially VSF capacity / output accounts for about 90% in China. In 2013, China's VSF capacity approximated 3.45 million tons, 51.8% of which came from the top five enterprises, namely Fulida Group, Sanyou Chemical, Aoyang Technology, CHTC HELON and Shandong Yamei, showing a high industry concentration.

In 2011-2013, the sluggish textile industry pulled down China's overall prices of viscose fiber, resulting in a market downturn. However, based

on promising prospects and corporate development needs, Sanyou Chemical, Sateri and Xinxiang Chemical Fiber are still planning to expand capacity with a focus on differentiated high-end products.

Being one of the Chinese VSF companies holding the highest product differentiation rate, Sanyou Chemical can reach above 80%. Following the operation of the 160,000 tons/a differentiated VSF project and the transformation of some production lines, the company, with overall VSF capacity of 480,000 tons/a as of end-2013, has become one of the largest VSF manufacturers in China. Furthermore, the company also plans to release incremental capacity of 50,000 tons through technological reform in 2014.

Sateri had only reached 210,000 tons/a viscose fiber by the end of 2013; but as China's largest dissolving wood pulp (DWP, the main raw material for viscose fiber) supplier, it enjoys around 40% market share with obvious cost advantages. Meanwhile, Sateri is accelerating the downstream viscose fiber capacity expansion, and its Fujian plant will obtain additional differentiated viscose fiber capacity of 150,000 tons/a in 2014 (wherein, 50,000 tons/a was realized in January and March 2014 each, and the remaining 50,000 tons/a will be put into operation in the third quarter).

As one of the largest VFY producers in China, Xinxiang Chemical Fiber saw VFY capacity of 60,000 tons/a in 2013. Currently, its subsidiary ----- Xinjiang Bailu has completed the “100,000 tons/a New-type Cellulose Project Phase I” and can accomplish full production in the first half of 2014.

The report mainly includes the following aspects:

- ✘ Supply, regional structure, competition pattern and trends of the global viscose fiber market;
- ✘ Supply, capacity, competition pattern, policies, import, export and prices of Chinese viscose fiber market;
- ✘ Status quo and competition pattern of Chinese bamboo fiber market segments;
- ✘ Operation, revenue structure, gross margin, major clients, viscose fiber business and development of 18 domestic and foreign viscose fiber production enterprises.

Capacities of Major Viscose Fiber Enterprises in China, 2013



Source: Global and China Viscose Fiber Industry Report, 2013-2016; ResearchInChina

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